

User Manual



Merging Contacts



Merging Contacts in MAX

- Over time duplicate names may have been created in your system. You can now Merge them together into one contact.
 - You can merge as many names together as you would like.
 - Once names have been merged you can NOT undo them. Please make sure you are merging the correct names before you hit the merge button.
 - This feature will merge all notes, polices, files, tags, and data associated with the names.

Search for the Contacts to Merge

Dashboard
Attract
Communicate
Manage
Success

Contact Manager

29 Results

Event Calendar for

Monday, June 16
Tuesday, June 17
Wednesday, June 18
Thursday, June 19
Friday, June 20

16
17
18
19
20

☐ First Last
Temp Phone
Email
City Zip
County

Last Contact
Last Updated
Date Added
Status : Actions Taken

Next Contact

Last Action: Note

George Wilson
905 Little Perch Lk S
Gwinn, MI
(906)346-3357
6/17/2013

2 weeks ago
last month
11 months ago

PAST:
last month

Email Sent: The system
sent this email: "ASB May
Newsletter"

import test inbox infofree golf

Jessica Beacham
254 York Road
Turnersville, NJ 08012

7 months ago
4 months ago
9 months ago

Contract: Update lead from
T-65 to Submitted
CarrierName: Care

Standard View
Mine

Manage Event Calendar Settings

Search

Search by Tag

Exclude by Tag

Take Action

Actions for Selected

From the contact manager enter the search criteria you want to use to find your contacts (i.e., last name)

Click Search

Search Results

☐

First Last

Temp Phone

Email

City Zip

County

Last Contact

Last Updated

Date Added

Status : Actions Taken

Next Contact

Last Action: Note

<input type="checkbox"/> <div> <div>James Hill</div> <div>12 Market Street</div> <div>Mt Laurel, NJ 08054</div> <div>(856)555-1234</div> <div>10/1/1949</div> <div> <div>email</div> <div>football</div> </div> </div>	<div>22 hours ago</div> <div>21 hours ago</div> <div>22 hours ago</div> <div>Default :</div>	<div>2 weeks</div> <div>New: Vacation in 2 weeks</div>
<input type="checkbox"/> <div> <div>J Hill</div> <div>123 Market Street</div> <div>Mount Laurel, NJ 08054</div> <div>10/1/1949</div> <div> <div>call</div> <div>life</div> <div>follow up</div> </div> </div>	<div>22 hours ago</div> <div>21 hours ago</div> <div>22 hours ago</div> <div>Client :</div>	<div>New: Needs additional coverage</div>
<input type="checkbox"/> <div> <div>Jim Hill</div> <div>123 Market Street</div> <div>Mt Laurel, NJ 08054</div> <div>(856)555-1234</div> <div>10/1/1949</div> <div> <div>call</div> <div>football</div> <div>golf</div> <div>1q call</div> <div>asb happy birthday</div> </div> </div>	<div>22 hours ago</div> <div>21 hours ago</div> <div>22 hours ago</div> <div>Lead : Call</div>	<div>Call: Set appointment for Wednesday at 7:30 pm</div>

Take Action

Add New Contact

Invite Contacts

Search Contacts

Search "Mail Leads"

Search Submitted

Actions for Selected

Purchase Service

Broadcast Email

Email Lists / Dnp Emails

Transfer Contacts

Manage Tags

All contacts fitting your search criteria will be displayed.

Selecting Contacts to Merge

City Zip
County

Status : Actions Taken

☒ James Hill
12 Market Street
Mt Laurel, NJ 08054
(856)555-1234
10/1/1949
email football

22 hours ago
21 hours ago
22 hours ago
Default :

2 weeks
New: Vacation in 2 weeks

☒ J Hill
123 Market Street
Mount Laurel, NJ 08054
10/1/1949
call life follow up

22 hours ago
21 hours ago
22 hours ago
Client :

New: Needs additional coverage

☒ Jim Hill
123 Market Street
Mt Laurel, NJ 08054
(856)555-1234
10/1/1949
call football golf 1q call asb happy birthday

22 hours ago
21 hours ago
22 hours ago
Lead : Call

Call: Set appointment for Wednesday at 7:30 pm

Search Contacts

Search "Mail Leads"

Search Submitted

Actions for Selected

Purchase Service

Broadcast Email

Email Lists / Drip Emails

Merge Contacts

Select the contacts that you want to merge by clicking the box next to the Contacts name.

Click Merge Contacts

Display of Names to Merge

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

☐ James Hill (2310150)
 ☐ J Hill (2310364)
 ☒ Jim Hill (2310147)

Ownerid	Test Agent	Test Agent	Test Agent
Lead Type		New Business	
First Name	James	J	Jim
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel	Mt Laurel
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234		8565551234
Cell	8565552345	8565550001	8565552345
Followup Date	7/7/2014 11:43 AM		
Priority	None	Warm	Hot
Role	Lead	Lead	Lead
Custom Status	Default	Client	Lead

The data from each Contact will be displayed alongside the other contact records.

The contact highlighted in grey is the name the system picks as the primary name that contains the most content or most activity.

Highlighted Data

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

☐ James Hill (2310150)
 ☐ J Hill (2310364)
 ☒ Jim Hill (2310147)

Ownerid	Test Agent	Test Agent	Test Agent
Lead Type		New Business	
First Name	James	J	Jim
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel	Mt Laurel
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234		8565551234
Cell	8565552345	8565550001	8565552345
Followup Date	7/7/2014 11:43 AM		
Priority	None	Warm	Hot
Role	Lead	Lead	Lead
Custom Status	Default	Client	Lead

The information that is highlighted is the information that will be kept for that field and merged into the consolidated contact record.

The system will automatically pick up data from another contact if the field is empty in the primary contact.

Selecting Data to Keep

Select the lead you wish to keep and the fields with values. Notes, Files etc. will be merged with the selected lead.

☐ James Hill (2310150)

☐ J Hill (2310364)

☒ Jim Hill (2310147)

Ownerid	Test Agent	Test Agent	Test Agent
Lead Type	<input type="text"/>	New Business	<input type="text"/>
First Name	James	J	Jim
Last Name	Hill	Hill	Hill
Address	12 Market Street	123 Market Street	123 Market Street
City	Mt Laurel	Mount Laurel	Mt Laurel
State	NJ	NJ	NJ
Zip	08054	08054	08054
Phone	8565551234		8565551234
Cell	8565552345	8565550001	8565552345
Followup Date	7/7/2014 11:43 AM		
Priority	None	Warm	Hot
Role	Lead	Lead	Lead
Custom Status	Default	Client	Lead

To select a different field, click on that field and it will become highlighted.

The highlighted fields are what will be kept after the merge.

Merging Contacts

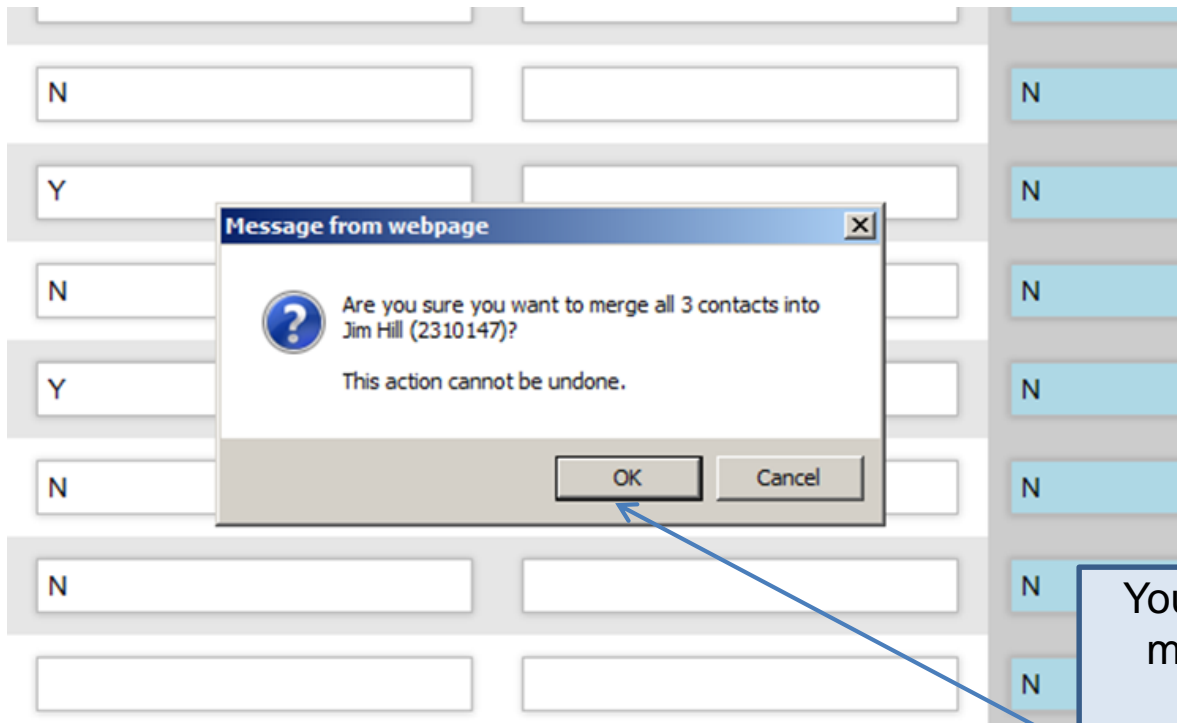
Help

Hospitalized Spouse	<input type="text" value="N"/>	<input type="text"/>	<input type="text" value="N"/>
Cancer	<input type="text" value="Y"/>	<input type="text"/>	<input type="text" value="N"/>
Cancer Spouse	<input type="text" value="N"/>	<input type="text"/>	<input type="text" value="N"/>
Kidney Issues	<input type="text" value="Y"/>	<input type="text"/>	<input type="text" value="N"/>
Kidney Issues Spouse	<input type="text" value="N"/>	<input type="text"/>	<input type="text" value="N"/>
Surgeries In Next Year	<input type="text" value="Y"/>	<input type="text"/>	<input type="text" value="N"/>
Surgeries In Next Year Spouse	<input type="text" value="N"/>	<input type="text"/>	<input type="text" value="N"/>
Emphysema Copd Oxygeno	<input type="text" value="Y"/>	<input type="text"/>	<input type="text" value="N"/>
Emphysema Copd Oxygeno Spouse	<input type="text" value="N"/>	<input type="text"/>	<input type="text" value="N"/>
Tobacco	<input type="text" value="N"/>	<input type="text"/>	<input type="text" value="N"/>
Tobacco Spouse	<input type="text"/>	<input type="text"/>	<input type="text" value="N"/>

Click **Merge Contacts** when you have completed selecting the fields you want in the merged file.

Merge Contacts

Confirming the Merge



You will receive the above message to confirm the merge.

Once you click ok
**THE MERGE CANNOT BE
UNDONE.**

Merged Contact (Final)

Manage Contact

Event Calendar for [Manage Event Calendar Settings](#)

Tuesday, June 17	Wednesday, June 18	Thursday, June 19	Friday, June 20	Saturday, June 21
17	18	19	20	21

First

Last

Company

Email

Phone

Mobile

Address

Loves dogs

Best to call after 5 pm

Has 2 grandkids

Last Contact 23 hours ago

Last Update 22 hours ago

Source

Click Here to Add Note

Take Action

Save

Save & Go To Next

Cancel

Quick Email

Email Lists / Drip Emails

Manage Files

Transfer Log

Delete Contact

After the merge is complete the system will return to the new (merged) contact record.

*Note the Additional comments at the top of the record have been combined.

Merged Contact (Final)

Phone (856)555-1234

Mobile (856)555-2345

Address 123 Market Street

City Mount Laurel State NJ

Postal 08054 Spouse Tina Hill

County

Time Zone Best Contact Time

Birth 10/1/1949 Spouse DOB 11/1/1950

Referred By

Last Contact 23 hours ago

Last Update 22 hours ago

Source Manual Entry

Owner testagent2

Temperature Hot

Type New Business

Status Lead

Follow Up 2014-07-07 11:43:33
Example: tomorrow 3:15 pm

Add to Calendar

Tags

email x call x life x

follow up x football x golf x

1q call x asb happy birthday x

Take Action

Save

Save & Go To Next

Cancel

Quick Email

Email Lists / Drip Emails

Manage Files

Transfer Log

Delete Contact

Policy Submission Form

Add New Policy

Need Help?

Submit Help Request

Data Capture

Medicare Information

Self	MS	MA
Plan Type		

Confined To Bed				
Diabetes				

Click Here to Add Note

The tags from all 3 records have been combined as well.

Merged Contact (Final)

Policies

Policy # 951357	Premium 46.00	Notes wants to get policy for spouse	Edit
Policy Type Life Insurance Policy	Source Existing		
Carrier Aarp	Date Added 6/16/2014 11:06 Am		
Status Issued	Effective Date 3/1/2012		
Owner J Hill			

Policy # 58525456	Premium 112.00	Notes	Edit
Policy Type	Source Existing		
Carrier Aflac	Date Added 6/16/2014 11:01 Am		
Status Issued	Submitted Date 5/16/2014		
Owner Jim Hill			

Take Action

- [Save](#)
- [Save & Go To Next](#)
- [Cancel](#)
- [Quick Email](#)
- [Email Lists / Drip Emails](#)
- [Manage Files](#)
- [Transfer Log](#)
- [Delete Contact](#)
- [Policy Submission Form](#)
- [Add New Policy](#)

Need Help?

- [Submit Help Request](#)

Notes

[New](#)
[Email](#)
[T9 Message](#)
[Call](#)
[Demo](#)
[Contract](#)

Click Here to Add Notes...

Policies have been moved to the new contact.

Merged Contact (Final)

Help

☆ New

0 seconds ago

✕

Merged Lead(s) on 06-17-2014

Merged by testagent2 (1078)

Data from Removed Leads:

Lead #2310150

id = 2310150

address = 12 Market Street

city = Mt Laurel

date_added = 2014-06-16 11:00:04

last_contact = 2014-06-16 11:20:37

last_modified = 2014-06-16 11:43:40

status = 1

status_list = '1'

tag_list = '30'619'

priority = None

custom_status = 0

admin_notes = Loves dogs

x_insurance_carrier = American Pioneer

x_spouse = Tina

x_premium = 200

last_action = New: Vacation in 2 weeks

x_plan_type = MS

x_plan_type_spouse = MS

x_insurance_carrier_spouse = American Pioneer

x_premium_spouse = 150

x_confined_to_bed = Y

x_confined_to_bed_spouse = Y

x_diabetes = Y

x_diabetes_spouse = Y

x_heart_trouble = Y

x_heart_trouble_spouse = Y

x_hospitalized = Y

..

Take Action

Save

Save & Go To Next

Cancel

Quick Email

Email Lists / Drip Emails

Manage Files

Transfer Log

Delete Contact

Policy Submission Form

Add New Policy


Need Help?

Submit Help Request


In the bottom notes there is a section that displays the data from the merged contacts that was not kept.

This is the only place that information from the merged contacts will appear

Merged Contact (Final)

 New


15 minutes ago


 Delete


Merged Lead(s) on 06-17-2014
Merged by testagent2 (1078)
Data from Removed Leads:


Lead #2310150
id = 2310150
address = 12 Market Street
city = Mt Laurel
date_added = 2014-06-16 11:00:04
last_contact = 2014-06-16 11:20:37
last_modified = 2014-06-16 11:43:40
status = 1
status_list = '1'
tag_list = '30'619'
priority = None
custom_status = 0
admin_notes = Loves dogs
x_insurance_carrier = American Pioneer
x_spouse = Tina
x_premium = 200
last_action = New: Vacation in 2 weeks
x_plan_type = MS
x_plan_type_spouse = MS
x_insurance_carrier_spouse = American Pioneer
x_premium_spouse = 150
x_confined_to_bed = Y
x_confined_to_bed_spouse = Y
x_diabetes = Y
x_diabetes_spouse = Y
x_heart_trouble = Y
x_heart_trouble_spouse = Y


Take Action


 Save


 Cancel

 Quick Email


 Email Lists / Drip Emails

 Manage Files

 Transfer Log

 Delete Contact

Need Help?

 Submit Help Request

This data can be deleted by clicking on the X to the right of the notes. If you choose to delete these notes they can not be retrieved again

Merged Contact (Final)

Help

Lead #2310364
id = 2310364
first_name = J
cell = 8565550001
date_added = 2014-06-16 11:06:21
last_contact = 2014-06-16 11:06:21
followup_date = 0000-00-00 00:00:00
last_modified = 2014-06-16 11:44:04
status = 1
status_list = `1`
tag_list = `47`103`260`
priority = Warm
custom_status = 11
admin_notes = Best to call after 5 pm
last_action = New: Needs additional coverage

☆ New

Vacation in 2 weeks

22 hours ago

×

☆ New

Needs additional coverage

22 hours ago

×

☎ Call

Set appointment for Wednesday at 7:30 pm

23 hours ago

×

Take Action

Save

Save & Go To Next

Cancel

Quick Email

Email Lists / Drip Emails

Manage Files

Transfer Log

Delete Contact

Policy Submission Form

Add New Policy

Need Help?

Submit Help Request

The bottom notes from the other 2 records are now all listed in the merged contact.

Merged Contact (Final)

Dashboard
Attract
Communicate
Manage
Success

Contact Manager

1 Results For Keywords: hill

Standard View
Mine

Manage Event Calendar Settings

Event Calendar for Test Agent

Tuesday, June 17	Wednesday, June 18	Thursday, June 19	Friday, June 20	Saturday, June 21
17	18	19	20	21

☐ First Last
Temp Phone
Email
City Zip
County

Last Contact
Last Updated
Date Added
Status : Actions Taken

Next Contact
Last Action: Note

☐

James Hill
123 Market Street
Mount Laurel, NJ 08054
(856)555-1234
10/1/1949

23 hours ago
9 seconds ago
23 hours ago
Lead : Call

2 weeks
Call: Set appointment for Wednesday at 7:30 pm

email call life follow up football golf 1q call asb happy birthday

Search

hill
Search

Search by Tag

Exclude by Tag

Take Action

Add New Contact

Invite Contacts

Search Contacts

Search "Mail Leads"

Search Submitted

Now, when a search is done using the same last name criteria for the search, only one record is found and displayed.